

A CLEAR UNDERSTANDING OF THE INDUSTRY

HOW WILL THE CFA INSTITUTE INVESTMENT FOUNDATIONS™ PROGRAM HELP YOUR FIRM?

The Investment Foundations Program is designed to give your employees a clear understanding of the investment management industry. The certificate program sets a new standard of industry knowledge and ethical awareness, thereby improving firm-wide communication, enterprise risk management, and employee engagement.

WHAT YOUR EMPLOYEES LEARN

The program covers the essentials of the investment management industry:



Module 1:
Industry Overview



Module 2:
Ethics and Regulation



Module 3:
Inputs and Tools



Module 4:
Investment Instruments



Module 5:
Industry Structure



Module 6:
Serving Client Needs



Module 7:
Industry Controls

THE BIG PICTURE

The Investment Foundations Program is a comprehensive global education program that provides a clear understanding of investment industry essentials. The program is designed for all professional disciplines outside of investment roles, including IT, operations, accounting, administration, and marketing. There is no education or experience requirement and the exam can be taken at your convenience at available test centers around the world.

HOW DO FIRMS BENEFIT?



Firm-Wide Communication
Firms benefit from their employees having a common understanding of industry structure and terminology, regardless of job function or geographic location.



Enterprise Risk Management
Employees have a strong understanding of the complexity of the investment management industry, the importance of compliance, and the confidence to speak up when issues arise.



Employee Engagement
Employees gain a better sense of their role in the firm and how they belong, improving their engagement and making them more effective.

"The more you understand how the business works, the better you understand what the client needs. It's about seeing the whole picture and being able to deliver—and that's where the CFA Institute Investment Foundations Program can help us."

GEORGE MCKAY
CO-HEAD, GLOBAL HEAD OF DISTRIBUTION AND GLOBAL COO, ALLIANZ GLOBAL INVESTORS

"We use the CFA Institute Investment Foundations Program to attract talent who have a demonstrable commitment to learning the industry."

BERNADETTE WHITE
SENIOR VICE PRESIDENT, TALENT DEVELOPMENT, CITCO FUND SERVICES

HOW TO FIND OUT MORE

Go to: cfa.is/InvFound